



Haverhill Retirement System

4 Summer Street, Room 303
Haverhill, MA 01830

Tel: (978) 374-2358
Fax: (978) 374-2353

REQUEST FOR PROPOSALS – PORTFOLIO MONITORING SERVICES

BACKGROUND

The **Haverhill** Retirement System (“System”) is governed by the **Haverhill** Retirement Board (“Board”) and is the pension system serving the **Haverhill** employees in **Essex** County, Massachusetts. The Board manages approximately \$**285** million in assets and employs a staff of **3** people in its office located in **Haverhill**, Massachusetts. The Board is seeking qualified law firms to provide portfolio monitoring and fraud litigation services for the System as more fully described herein. The portfolio monitoring and any associated evaluation and counseling services will be offered at no cost to the Board.

The Board and System are governed by Chapter 32 of Massachusetts General Laws and is a member of the Massachusetts Contributory Retirement System. The Board is subject to the oversight of the Public Employee Retirement Administration Commission (“PERAC”).

Proposed Time-Line: The current schedule for this procurement is as follows:

Friday, June 17, 2022, 8AM- RFP available.

Friday, June 24, 2022- 11:30AM- RFP question and comment period ends.

Friday, July 15, 2015- 11:30AM- RFP acceptance deadline.

Tuesday, July 19, 2022- 11:30AM- RFP’s to be opened.

Friday, September 14, 2022- RFP expected to be awarded.

Receiving Copies of the RFP: **In order to receive a copy of this RFP starting at 8AM on Friday, June 17, 2022 you must contact:**

(David S. Van Dam, 4 Summer Street, p: 978-374-2358, fax: 978-374-2353, dvandam@haverhillretirement-ma.org.

The RFP may be picked up at the Board’s office or emailed at no charge. The Board’s regular business hours are **M,W,Thur-8AM-4PM, Tues 8AM-7PM and Friday 8AM-12Noon.**